



INDONESIA MEDIA LANDSCAPE

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Country Overview

INDONESIA IS THE REGION'S BIGGEST ECONOMY AND PART OF THE G20 GROUP

Overview of Indonesia



CAPITAL
Jakarta

REGION
Asia

GDP PER CAPITA, PPP
\$12,335

GDP
\$1.12 trillion

POPULATION
270,625,568

AREA
1,904,569 SQ.KM

Made up of a chain of thousands of islands between Asia and Australia, Indonesia is the world's largest archipelagic state.

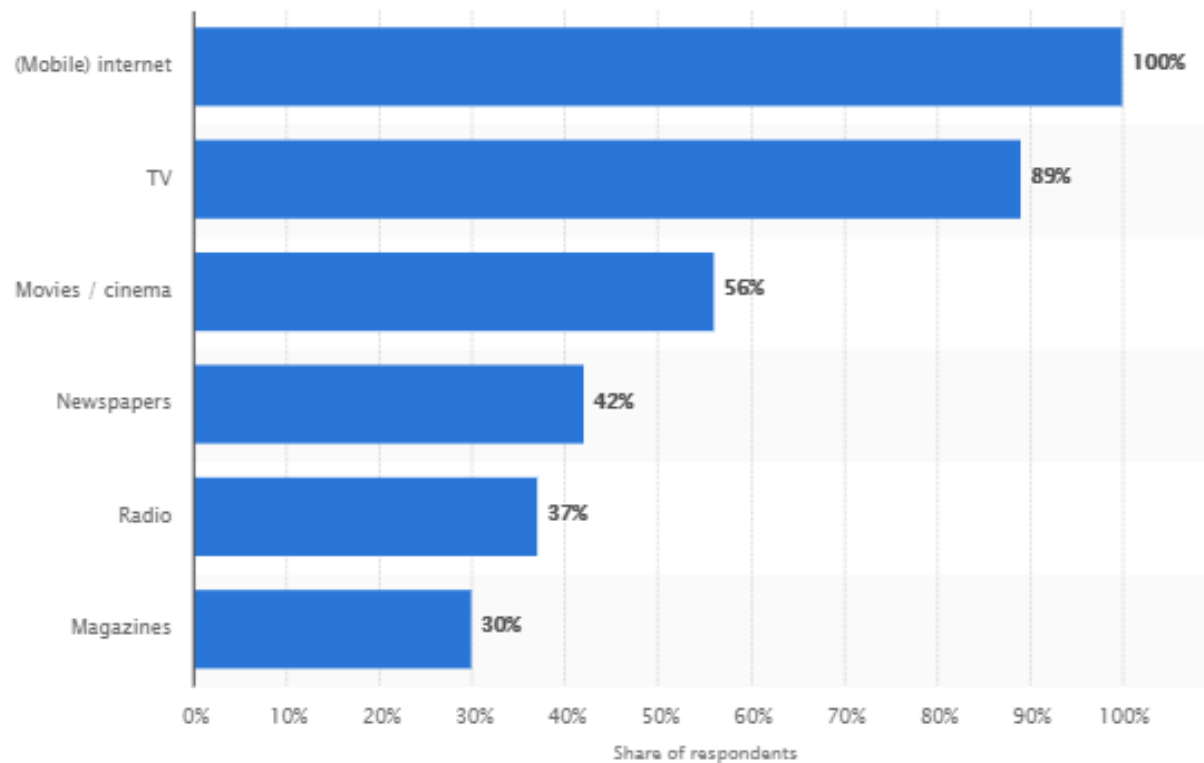
Indonesia's main exports include crude petroleum and natural gas as well as rubber, coffee, cocoa and palm oil.

Indonesia's people are diverse, speaking more than 300 languages and ranging from cosmopolitan urbanites to rural villagers.

Media Consumption Overview

TRADITIONAL MEDIA IS WELL ALIVE AND HERE TO STAY

Media usage by channel in Indonesia 2020



The average time spent with social media is 3 hours, 19 minutes



The most popular traditional medium



Radio maintains its position and is considered as a trusted source



Print still holds the ground

TV Consumption

TV VIEWERSHIP JUMPED 50% IN INDONESIA AMID STAY-HOME MEASURE

Indonesia E&M growth 2016-2021

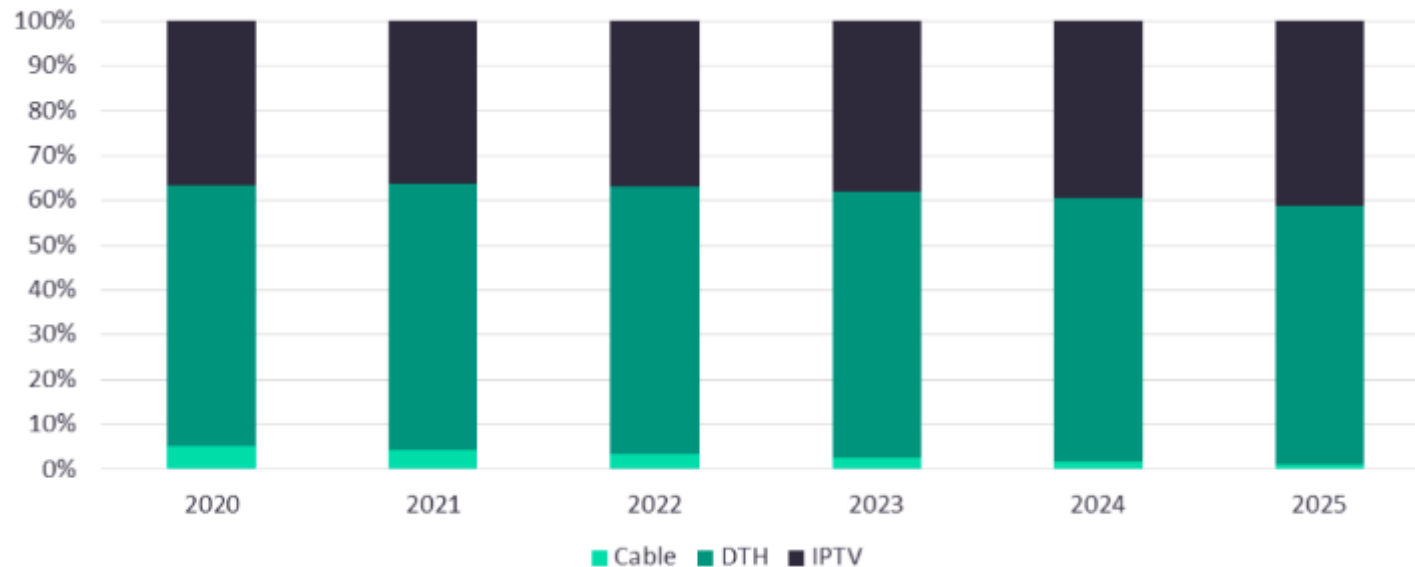


- Television is the most popular medium. Major national commercial networks compete with state-owned Televisi Republik Indonesia (TVRI)
- The upswing in TV viewership highlights the public's trust in mainstream media during the pandemic

TV Consumption

PAY TV MARKET IS SET TO GROW BY MORE THAN US\$130 MILLION OVER THE COMING YEARS

Pay-TV subscription by technology (%)



- While cable TV subscriptions will decline at a CAGR of 19% between 2020 and 2025, those losses will be offset by considerable growth in DTH and IPTV subscriptions
- DTH will be the leading pay-TV service platform in Indonesia, in terms of subscriptions during 2020-2025, and will go on to account for 58% of the total pay-TV subscriptions by the end of 2025. IPTV, on the other hand, will see its subscriptions grow at a faster CAGR of 12% over the forecast period

TV Consumption

TOP TV CHANNELS

MNC TV



MNCTV is an Indonesian private television station. It shows programmes such as quizzes, sinetron (soap operas), reality TV shows, sports shows, and recently, dangdut music.



Rajawali Citra Televisi Indonesia (RCTI)

RCTI is an Indonesian free-to-air television network based in West Jakarta. It is best known for its news programmings, sports events, celebrity bulletins and soap operas.



Televisi Republic Indonesia (TVRI)

TVRI is a public television network and the oldest television network in Indonesia.. TVRI operates three national channels as well as 30 regional stations and 361 transmitters.



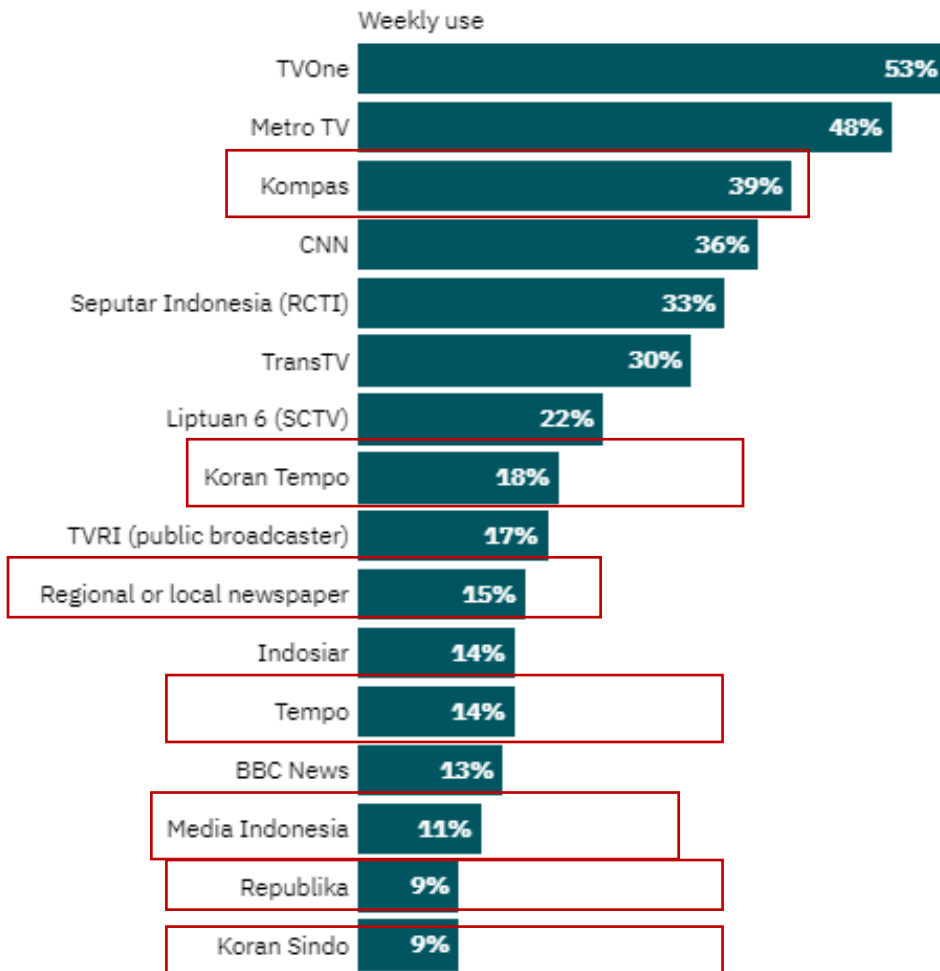
Surya Citra Televisi (SCTV)

SCTV is an Indonesian free-to-air television network. It broadcasts daily news, local programming, and sports and is popular for its soap operas.

Print Consumption

PRINT NEWSPAPER SEES A COMPETITION FROM ITS DIGITAL COUNTERPART

Weekly reach – Print (2021)



- There are 8 groups of big publishers: Kompas Gramedia Group, Jawa Pos, Femina, Bali Post, Pin Point, Pikiran Rakyat, Bisnis Indonesia, and Suara Merdeka
- Indonesians spend an average 31 min reading newspaper and 24 min reading magazine per day

Print Consumption

TOP PRINT TITLES



Kompas **Circulation: 500,000**

Kompas is an Indonesian national newspaper published by Kompas Gramedia Group. Highly-regarded as the most influential newspaper in Indonesia, Kompas is not just the largest circulating print media company in the country but also the largest circulating newspaper in Southeast Asia.



Jawa Pos **Circulation: 450,000**

Founded in 1949, Jawa Pos is an Indonesian national daily newspaper based in Surabaya. The largest local newspaper chain in Indonesia with 130 titles across the country.



The Jakarta Post **Circulation: 40,000**

The Jakarta Post is a daily English-language newspaper in Indonesia. The newspaper is targeted at foreigners and educated Indonesians, although the middle-class Indonesian readership has increased.



Bisnis Indonesia **Circulation: 85,000**

Bisnis Indonesia is a daily business newspaper published in Jakarta, Indonesia. It primarily covers Indonesian financial and business news, as well as issues around the world.

Radio Consumption

TOP RADIO STATIONS



Prambors FM **Frequency: 102.2 FM**

Officially launched on March 18, 1971, the station aimed to share popular music with its followers. Popular among the youth, the majority of listeners are teenagers who tune into top hits from national and international artists.



Radio Republik Indonesia (RRI) **Frequency: 91.2 FM**

Established in 1945, Radio Republik is a public radio network owned by the government. Broadcasting 24 hours a day, RRI covers a variety of programs such as music and entertainment, news, culture, education, etc.



Radio Dangdut Indonesia Jakarta **Frequency: 97.1 FM**

Launched on October 20, 2010 in Jakarta, Radio Dangdut Indonesia (RDI) broadcasts dangdut music, which is a genre of Indonesian folk and popular music.

Digital Consumption

THE NUMBER OF INTERNET USERS IN INDONESIA INCREASED BY 16% BETWEEN 2020 AND 2021



Digital Consumption

INDONESIANS SPEND THE MOST TIME ON YOUTUBE

JAN
2021

TOP WEBSITES BY TRAFFIC (SIMILARWEB)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO SIMILARWEB

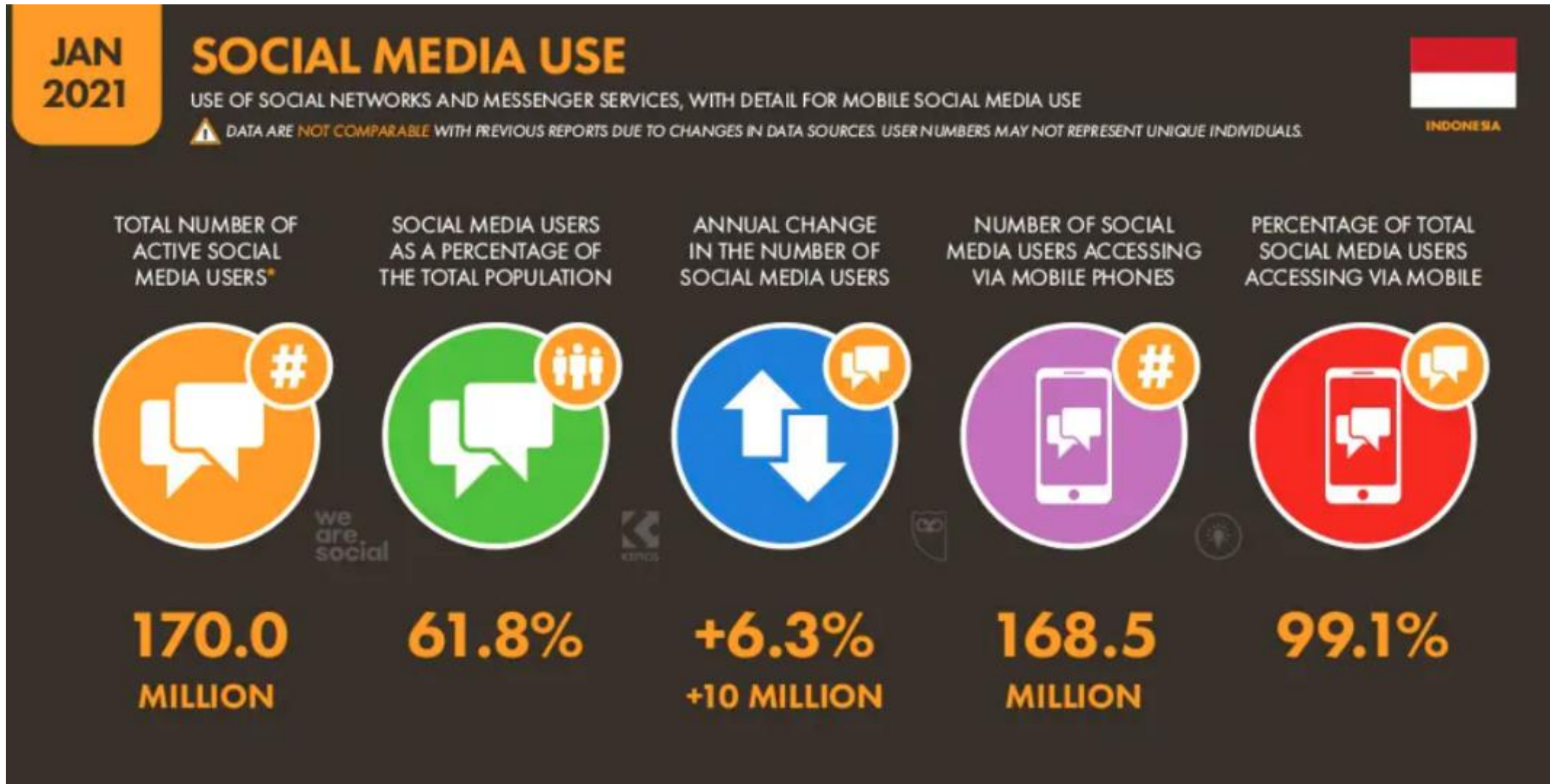


| # | WEBSITE | TOTAL VISITS | UNIQUE VISITS | TIME PER VISIT | PAGES PER VISIT |
|----|----------------|--------------|---------------|----------------|-----------------|
| 01 | GOOGLE.COM | 2.26B | 135M | 9M 10S | 8.0 |
| 02 | YOUTUBE.COM | 900M | 78.3M | 22M 20S | 10.4 |
| 03 | FACEBOOK.COM | 663M | 82.5M | 8M 37S | 8.0 |
| 04 | WHATSAPP.COM | 253M | 42.7M | 2M 19S | 1.5 |
| 05 | TRIBUNNEWS.COM | 224M | 51.0M | 5M 02S | 3.1 |
| 06 | BRAINLY.CO.ID | 198M | 43.2M | 10M 18S | 7.2 |
| 07 | INSTAGRAM.COM | 192M | 32.7M | 8M 24S | 12.3 |
| 08 | KOMPAS.COM | 182M | 45.0M | 4M 47S | 2.4 |
| 09 | DETIK.COM | 171M | 33.4M | 5M 16S | 2.8 |
| 10 | GRID.ID | 141M | 37.6M | 2M 39S | 3.1 |

| # | WEBSITE | TOTAL VISITS | UNIQUE VISITS | TIME PER VISIT | PAGES PER VISIT |
|----|--------------------|--------------|---------------|----------------|-----------------|
| 11 | TWITTER.COM | 140M | 22.0M | 12M 24S | 15.7 |
| 12 | SHOPEE.CO.ID | 124M | 38.1M | 6M 35S | 6.9 |
| 13 | TOKOPEDIA.COM | 113M | 35.1M | 6M 19S | 6.0 |
| 14 | XNXX.COM | 108M | 12.6M | 8M 24S | 14.0 |
| 15 | WIKIPEDIA.ORG | 85.9M | 29.5M | 3M 23S | 2.5 |
| 16 | JPN.N.COM | 82.4M | 43.0M | 0M 27S | 2.5 |
| 17 | ZOOM.US | 72.1M | 24.3M | 3M 35S | 2.9 |
| 18 | GOOGLE.CO.ID | 66.3M | 19.1M | 6M 01S | 11.0 |
| 19 | UPUTAN6.COM | 64.8M | 27.8M | 0M 37S | 1.3 |
| 20 | PIKIRAN-RAKYAT.COM | 63.1M | 41.1M | 1M 07S | 2.4 |

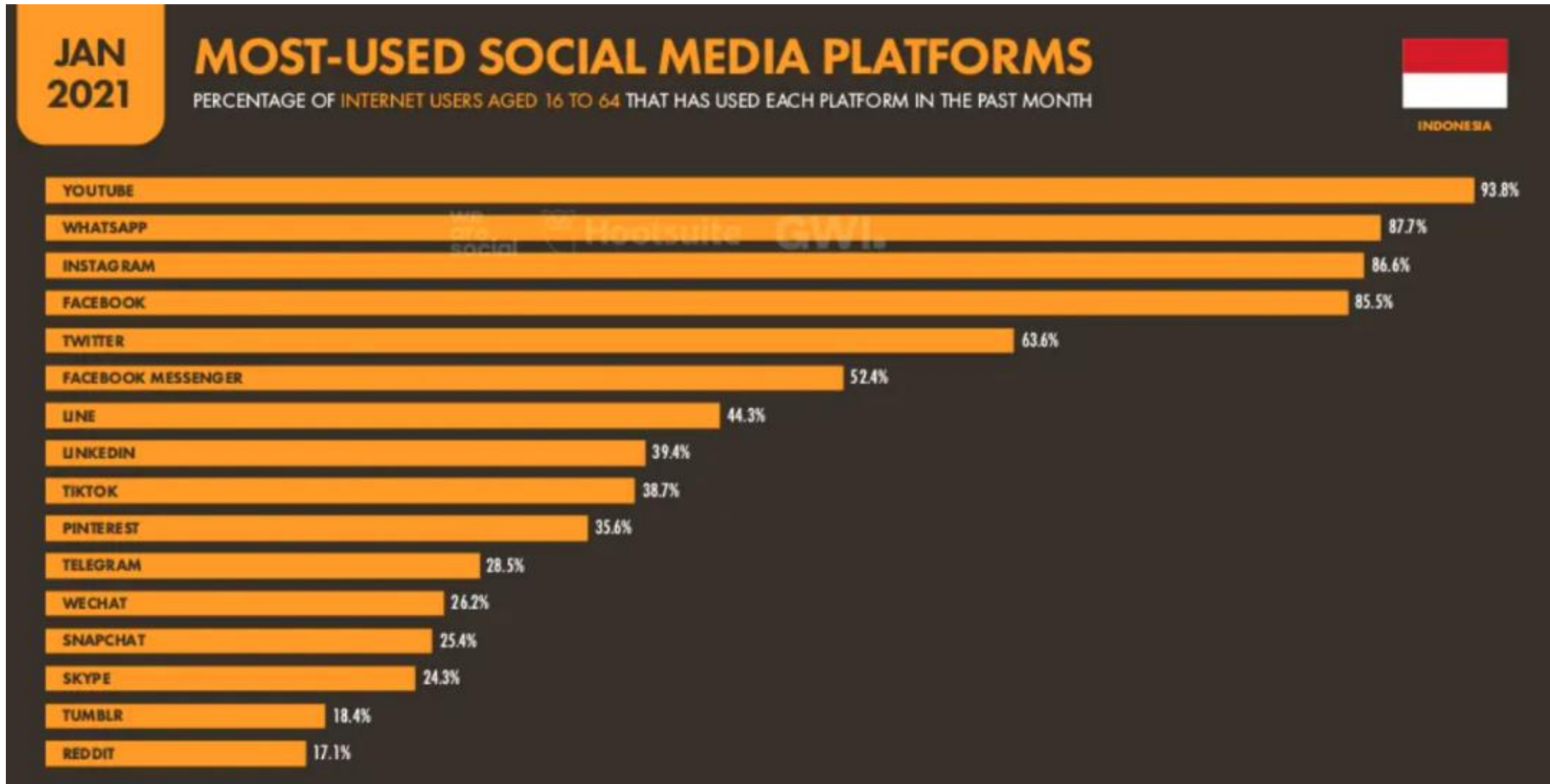
Digital Consumption

THE NUMBER OF SOCIAL MEDIA USERS IN INDONESIA INCREASED BY 6.3% BETWEEN 2020 AND 2021



Digital Consumption

YOUTUBE IS THE MOST USED SOCIAL MEDIA PLATFORM



Outdoor Sites

SCBD LOT 6



Location: Within
Senayan CBD, Jakarta

Format: LED

Size:
8m(W) x 4m(H)

No. Of Screens: 1

Outdoor Sites

SCBD LOT 9



Location: Within
Senayan CBD, Jakarta

Format: LED

Size:
8m(W) x 4m(H)

No. Of Screens: 1

Outdoor Sites

SCBD LOT 23



Location: Within
Senayan CBD, Jakarta

Format: LED

Size:
10m(W) x 5m(H)

No. Of Screens: 1

Let's Discuss

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